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Making Reference: The Business Behind Books

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Reference Classics Ahead of Their Time

from page 26

ticles. In the print world, the *Science Citation Index* and its related tools magically linked together material that otherwise would have been very difficult to retrieve.

Before Its Time Award

Of all of the reference works that were created before the technology caught up with the idea for the product, there is one that stands out above all others. Designed at **Yale University** in 1949, it incorporated all of the ideas that would one day comprise the Web. It used highly sophisticated indexing, linking between documents, and was a completely full text database. The winner of the **Before Its Time Award** is the *Human Relations Area File (HRAF)*.

Although this resource may not be as widely known or used as the others on this list, its scope, content, and format make it worthy of this award. *HRAF* has always been a model of genius and scholarship. Covering ethnographic information on cultures around the globe, the *HRAF* is a standard information source for anthropologists. From Ojibwa to Oneida, Ouoloff to Uzbek, every cultural group in the world is represented in this resource. Each culture is documented with a cultural summary that describes the geographic, linguistic, economic, social, and religious aspects of the people. Indexing is extensive, including geographic, subject, and cultural terms.

The real gem of the *HRAF* is its access to full text documents. The editors provide full text of original research reports on every cultural group. Those reports contain not only text, but also images relevant to the cultures being studied. Because of the high level of specificity of the database, full text entries are provided even when they are only a subsection of a work covering another group or topic. When a cultural group had not been widely studied, our entire knowledge of that group might consist of only a few paragraphs from a work on another culture. Through its indexing and scholarly design, that information could be found within the *Human Relations Area Files*! With its detailed indexing, coordinated subject searching, and available full text, the experience of using the *HRAF* was similar in feel to a good **Google** search.


Amazingly, the editors created this enlightening search experience using print and microfiche. The original *HRAF* files were actually distributed on 5"x8" paper sheets. Approximately 300 cultures were covered on those original paper files. Starting in 1958, those files were

distributed in microfiche. Since then, hundreds of thousands of documents have been indexed and distributed covering thousands of cultures. If ever a resource were destined for the Web, this one was it.

Of course, *HRAF* is now available in electronic format. For a short time, it was distributed on CD-ROM, with each CD covering a few cultures. Unfortunately, this technology almost seemed like a step backwards, since you had to figure out which CD had your culture on it before you could start searching. Now that the *HRAF* is on the Web, technology allows us to easily take advantage of the depth of information contained in the database. Researchers can browse through cultures, search for specific topics, features, or places, and read the culture summaries and full text documents online.

Had the *Human Relations Area Files* been created in the Web environment, it probably would be viewed as another very good research tool, but nothing special. What the editors created with the technology that they had available to them (paper and microfiche) is remarkable. *HRAF* is the best source designed for the Web that came out before the Web was invented.

Further Awards

Now it's your turn. These five awards are one librarian's tribute to reference sources ahead of their times. If you want to make up your own awards to give to any other sources, let *Against the Grain* know. We want to hear from you about how you use information sources, what you like about them, and what you do not like. If you want to fill this space in future issues with your knowledge, opinions, or irreverence, contact (Guest Editor: **Tom Gilson** <gilson@cofc.edu>). We look forward to hearing from you. 

Endnotes

1. Rettig, James. *Distinguished Classics of Reference Publishing*. Oryx Press, 1992.
2. Broyard, Anatole. "An Orgy of Serendipity." *New York Times*, v. 123, June 10, 1974, p. 29.
3. Davis, Robert Gorham. "Subject: The Universe." *New York Times Book Review*, December 1, 1974, p. 98.
4. Katz, Bill. *Basic Information Sources*. 6th ed. McGraw-Hill, 1992, p. 240.
5. After two years of inactivity, some new content has finally been added to the ERIC database. For updates on the status of ERIC, see: http://www.eric.ed.gov/ERICWebPortal/resources/html/about/about_eric.html.

Making Reference: The Business Behind the Books

by **Karen Christensen** (CEO, Berkshire Publishing Group; Phone: 413-528-0206) <karen@berkshirepublishing.com>

In **H. G. Wells's** novel *Tono Bungay*, the uncle of the hero grumbles, "I'd like to know what sort of trading isn't a swindle in its way. Everybody who does a large advertised trade is selling something common on the strength of saying it's uncommon." In response, the hero describes something like old-fashioned publishing: "Some businesses are straight and quiet, anyhow; supply a sound article that is really needed, don't shout advertisements."

Publishing is a business, but many people who work in it are there because of their love of editing, writing, and learning. As a result, the business of publishing is often talked about as a necessary evil. Even when it comes to activities like conference sponsorship and exhibits, which are driven entirely by financial imperatives, we seem not to want to think about bald commercial realities. And when it comes to books themselves, editors hate to talk in terms of commercial value.



I myself was horrified the first time I heard someone refer to a book as a "product." I was at the **Gale** offices in Detroit in 1995, and like many people in publishing and in libraries, I didn't think of what I was about to embark on as business, with the same crude financial challenges that confront people in less literary endeavors. But there are many costs involved in creating good reference publications. If we all understand these factors of production, it'll be easier to talk about the important issues publishers and librarians face today, from pricing and licensing to copyright and collaboration.

I offered to write about the business of reference because I'm a new convert to it: someone who's had to learn it from the ground up very quickly, and who came to it from a literary and scholarly background, not from business or marketing. When **Berkshire** was

creating encyclopedias solely as a packager, or book producer, for large companies such as **Scribner's**, **Macmillan**, **Sage**, and **ABC-CLIO**, we were able to focus on content and leave the production and marketing to our client partners. Since making the decision to start publishing our own reference works — with the first set launched less than a year ago — I've had a crash course in marketing, sales, and distribution, as well as book production. This puts me in a position to provide a primer for librarians, an overview of what publishers have to do in order to get reference publications onto library shelves. I will focus here on print reference, because for most reference publishers it remains the foundation of their business and also their major source of income, and because this lays the foundation for a later discussion of the costs, and potential savings, associated with online products.

Business Basics

The basic process of business — or trade —
continued on page 30

Making Reference: from page 28

is simple enough. The businessperson's aim is to create a product at the lowest possible cost and then finding the largest number of people to buy it for the highest possible price. Every business faces the same challenges: creating a desirable product; identifying the best customers, seasons, and locations to sell their wares; getting the product to the customers in good condition; negotiating the most favorable terms; collecting the money due.

The success of a business is measured in profit, and every publishing project begins with a profit-and-loss (P&L) statement. It shows the expenses that will be incurred, the revenues that will be generated by sales, and then the profit expected. You might think that businesses would just look to see that a project was expected to make a profit (that is, earnings would be greater than costs of production and marketing), but what they're more interested in is the return on investment (ROI). ROI is what enables a businessperson to decide which projects to take on; it's also a measure of the risk involved. Reference publications involve considerable risk, because they tend to be very large and to take a long time to do. A company may invest hundreds of thousands of dollars before seeing a dime in return. But the ROI can also be substantial. If a company spends, say, \$800,000 over the course of three years developing a publication that sells for \$700, and they sell 2,000 copies, their gross income will be \$1,400,000. After subtracting the costs of distribution, this might provide an ROI of 40 percent. On the other hand, even reference books can flop, and a publisher may end up losing money.

The minimum targets in corporate publishing have changed dramatically in the past decade. Where once 18% was considered a stretch by the publisher, over 30% is now common. We know a publisher that sets 40% as a base ROI — a huge profit margin, out of line with expectations in other industries. An ROI of 15-20 percent is considered acceptable by major investment banks, and a banker friend speculates that either a large percentage of projects fail to meet targets, so the company needs a few projects to do exceptionally well, or reference is considered a cash cow that needs to support other divisions of the company.

Size and Ownership

How reference publishers deal with their targets depends in part on their size, on whether they're for-profit or nonprofit companies, and who owns them. Most reference publishers are for-profit companies, but one well-known reference publisher, **Oxford**, is a nonprofit, which means that it does not pay taxes and is sometimes the recipient of grant funding unavailable to other publishers. When it comes to size being bigger can mean that the demands are all the more crushing: a transnational media corporation may set quarterly targets for every division, and those demands affect pricing as well as what books are produced. The largest publishers have reference divisions or even reference companies (**Greenwood**, for example, is

part of **Reed Elsevier**). **Sage**, after forty years, is still privately owned, while **Facts on File** is owned by an investor group.

Ownership has a considerable impact on a company's decisions, too, especially on long-term strategies for digital delivery. When a company is trying to maximize its value in the short-term (to become an acquisition target) it will focus on driving up revenue in the simplest way possible, because company valuation is a multiple of revenue. This doesn't lend itself to innovation. Unfortunately, privately-held publishing companies with considerable cash aren't generally innovators either: it's just not part of the culture of scholarly and reference publishing. It may be that innovation in digital publishing will have to come from outside the industry.

Having set the scene, I'll take you now through the process of creating, marketing, and distributing the archetypal reference work — the encyclopedia.

Creating an Encyclopedia

While there are many kinds of reference works — directories, dictionaries, bibliographies, chronologies, and more — encyclopedias are the most celebrated, the most expensive, and the most variable. Perhaps because they are so large, encyclopedias seem like an act of God, a mountain that was heaved from the depths of the earth, complete and immutable, to its place in the sun. It's hard to remember that they are the works of human hands and minds, the result of humble human toil. You might say that the creation of an encyclopedia is a kind of agriculture of the mind, a careful harvesting of the bounty of intellectual endeavor.

The business formula for creating an encyclopedia is simple enough. Choose a topic; get articles written (by as few as one or as many as hundreds of scholars or freelance writers); edit the manuscript, have it typeset, and printed; then sell it to waiting libraries.

The Topic

Most publishers have complex acquisitions processes based on surveys and focus groups. But there seems to be general agreement that what really drives a project is the enthusiasm of an editor or editorial team. At **Berkshire**, because our primary affiliation is with the academic community, we seem to have a fairly good sense of what teachers and students are looking for. We also follow the news and public debate closely to identify important trends and developing areas of interest.

If we choose well, we'll have an encyclopedia that libraries will want to buy and that people will want to use. But a good topic rewards a publisher even early on, during the development process, because of the enthusiasm it inspires. The *Berkshire Encyclopedia of World Sport*, for example, was easy to develop because people wanted to be on the team, and it was completed with exceptional speed because everyone wanted to cross the finish line and win the race. By contrast, if you take on a topic such as the history of the Middle East, you will need patience and diplomacy.

The Contributors

The value of scholarly reference lies in its

being compiled from the work of those who know each aspect of a particular subject best, and an ideal encyclopedia would consist of articles written by the most eminent and respected of scholars. But the truth is that most encyclopedia articles, even in the works of eminent presses, are written by eager-to-be-published junior and independent scholars. Contributors to encyclopedias are paid little (perhaps a few hundred dollars for an article, rarely more, and sometimes nothing at all). In the past it seemed that only the major imprints, using both cash and cachet, could attract established scholars. Today, because monograph publishing has been so drastically cut (it is no longer profitable), scholars need publishing opportunities and can sometimes be tempted to lesser-known companies, even to those who offer little payment or promises of future royalties.

Berkshire has never been in a position to pay much, but we've chosen to work with top scholars, so we've had to be creative. We try to make participation in an encyclopedia something like attending a conference with old friends and new colleagues. We show our appreciation by making our projects interesting, editorial guidelines clear, feedback prompt, and communications personal. We make sure that they get copies of the work and keep them posted about reviews and awards.

The In-house Staff and Freelancers

Then there are in-house staff, from a managing editor to acquisitions and developmental editors and their assistants, who traffic articles, answer queries, and generally keep the editorial ship headed in the right direction. In-house operations can be run well or badly, but in terms of the overall economies of reference publishing, in-house staffing costs are dwarfed by general company overhead. Long-established companies have cut staff by as much as 50% or more in recent years, and yet expected more product. This contributes to what is often considerable tension between larger companies' editorial, marketing, and IT departments, with the editorial department often convinced that they are the only ones who care about upholding the old standards.

Another source of conflict is the fact that most publishers have switched to using freelancers for copyediting, page design and composition, art research, and proofreading, a considerable change from even five years ago. This can drastically cut costs and give the publisher more control. Managing these freelancers is something I hear people at big, traditional companies (that in the past had in-house staff) complain about, but at **Berkshire** our freelance network works very smoothly and is very much part of our team — in fact, it's given us the advantage of having top-notch professionals that we could never recruit as full-time staff. (**Francesca Forrest**, for example, whose first **Berkshire** project was the *Encyclopedia of Modern Asia*, edited this article.)

Designing the Book

Library reference publishers have not put much money into book design, and even today the more scholarly a work, the uglier its cover and pages are likely to be, especially in the sci-

continued on page 32

Making Reference: from page 30

ences. I've been amused by the reverse snobbery of readers: if a book looks inviting, it can't be serious. There was an advantage to publishers in this: good design costs money. An attractive cover will cost thousands of dollars, and a similar sum will go into planning an attractive interior.

Most people don't realize that highly illustrated books cost far more to compose and produce than a straightforward black-and-white job. Photos have to be located, sized, and formatted, and permissions need to be acquired. The same thing applies to maps. Staff editors who have worked on traditional plain vanilla reference often don't realize how different and how much more expensive this is. On the other hand, illustrated books can have a far wider market. The reference and scholarly publishing world has operated by keeping cost low and prices high but selling relatively few copies.

Pulling All the Pieces Together

The details of how various reference publishers manage the process of putting an encyclopedia vary, but all must first create a list of headwords to go with their topic. They then must match up those headwords with people who can illuminate the headword for readers through an informative article. Once the company has received some percentage of the articles, copyediting can begin, after which the articles are sent to the authors for review (always electronically in our case). Any corrections and amendments made by the authors are entered before the work goes to composition.

Extensive coding is often done to make composition of pages go smoothly and to prepare content for online distribution, too. Oddly enough, publishers are only now beginning to standardize spellings and terminology across their works to make online products consistent (major reference publishers, for example, still use different spellings of Qu'ran/Koran/Quran in different works). Choice of standardized spellings, like many editorial decisions, creates additional work for proofreaders. Proofreaders mark both content errors (spelling mistakes and sometimes factual errors or inconsistencies) and composition errors. Proofreading is still generally done on paper, though this is beginning to move to online systems.

Finally, when pages are corrected and perfected, electronic files are prepared for the printers, who are also operating digitally. Files are uploaded via FTP, and proofs come in electronically. Modern-day publishing depends, from start to finish, on human-computer interaction, and publishers are struggling today to modernize old systems, manage content archives, and save money through improved workflow management (this will sound familiar to any librarian!).

Marketing an Encyclopedia

Although they don't use the medium of television, reference publishers do spend hundreds of thousands of dollars — even millions, in a couple of cases — every year getting the word out about their publications. These costs are

figured into the P&L for any given publication and are reflected in the publication's price. (Encyclopedia pricing, by the way, is far more art than science — as far as I've been able to tell, it is based on ROI targets and what the market will bear.)

Reviews and advertising

Reviews seem like a brilliant way to market a book — assuming, of course, that the reviews are favorable — because, unlike advertising, which can run to \$6,000/page or more in certain journals, reviews don't cost anything. Or so a layperson might think. But as I contemplated launching out into independent reference publishing, I was told that to get reviews, I would have both to place expensive ads and hire a publicist, who would help me wine and dine the people who commission reviews. This was a daunting, worrying prospect. But the wall between editorial and advertising — which a magazine publisher I know calls "church and state" — seems to be higher than my advisors thought. New publishers are few and far between these days, and even with the tiniest of advertising budgets, **Berkshire** has been able to get reviews, and has even felt welcomed.

Print advertising is an important part of most publishers' marketing campaigns. Ads placed in *Library Journal*, *Booklist*, *American Libraries*, *Choice*, and of course *Against the Grain* can be an important way to alert reference librarians to new publications and special launches. Online advertising is in early stages, but will no doubt become more and more important. The **Googleprint** program is also a kind of online advertising, with free samples — like many new approaches, there's no evidence yet of how successful this can be, or whether it will actually damage sales.

Sales Representatives

Everyone would agree that direct sales — a sales rep who visits each library — is the only thing that works consistently when it comes to persuading libraries to buy a given reference work. But reps receive anywhere from 25 to 50 percent of the price of what they sell, which is a sobering expense to contemplate. Reps are considered essential when selling digital reference because they can demo the product — just one reason why digital products are so costly.

Print Mailings and E-Mailings

Few publishers can any longer afford to use sales reps for print publications. Instead, we rely on print mailings and e-mailings, on conference exhibits, and — in a few cases — on telemarketing. Print mailings, as you know, are still primary; publishers who can afford it send out 30,000 pieces at a time, at a cost of perhaps \$1 per piece in total. U.S. postal rates are low, in international terms, especially for bulk mail, and that's why you see so many of the glossy full-color, multiple-fold marketing pieces and catalogues you're now used to.

Librarians complain that they get the same piece three times. This is because we may be renting different lists for different mailings. All publishers try to build in-house mailing lists, but even large publishers turn to list brokers as well, renting names and addresses by the thousands. To make matters worse, unlike direct-

mail marketing for, say, the magazines you subscribe to at home, there's no science to reference marketing. It's what is known as B2B (business-to-business) marketing, in which the person placing the order is probably not the person who was on the mailing list. This makes it difficult, even impossible, to track the results of a mailing and we are left with a marketing version of what soldiers call "spray and pray," another contribution to the cost of making reference that could perhaps be improved through better use of technology to ensure that librarians get the information they need but are not deluged with catalogues on subjects totally outside their range.

Conferences

Conferences are an essential part of the marketing mix, though as with direct mailings, nobody seems to know what impact they have. The social side of conferences is important to librarians and to publishers, but I am yet to be convinced that they are a cost-effective venue for publishers to market their products, or even for librarians and publishers to connect. But librarians have an interest in keeping publishers engaged, because exhibits support professional conferences that matter a great deal to librarians personally, and as a community. This kind of symbiosis makes it difficult to assess cost-benefit rationally, but librarians should be aware that the more publishers spend on marketing, the more they end up charging for their products.

Telemarketing

All the librarians we've ever talked to say they hate telemarketing. I won't waste time here talking about something so universally loathed except to say that some major publishers have in-house telesales departments and consider telemarketing an essential part of their business. It is more expensive than print mailings, but considerably less expensive than sales reps, and it is a way to get direct sales (without giving 20-35% to a distributor/vendor).

Distributing an Encyclopedia

Distributors/vendors are the epitome of the traditional middleman and they have a surprisingly strong grip on the publishing world. At their best, they provide special services, know their audiences, and see their role as matching up the right new books with the right customers. The complaint I hear, though, is that they are just order takers, that it's the acquisition librarians and the publishers' marketing departments who do all the work. Yet distributors take between 10 and 55 percent of the receipts (for reference, 20-35 percent is common). In the school market, there are also library sales companies that ask for a huge discount from publishers (50-70 percent), on a non-return basis. Librarians may not realize that these commissions help to drive up the cost of books and digital products, too.

Things become still more complicated once a publisher looks to non-U.S. markets. Overseas, there are even more layers between the publisher and the librarian: a distributor (who warehouses the books and processes orders), a library supplier (who takes orders but holds no

continued on page 34


stock), and a sales agent (who visits the suppliers and provides product information). Each of these people get a percentage of the sale, ranging from 5 to 25 percent each. Many companies also pay a PR firm to handle conferences, catalogues, direct mail, and advertising. Given the additional shipping and warehousing costs involved, overseas sales can be prohibitive for smaller publishers unless they find innovative ways to reach customers (and, in the process, cut the length of the food chain).

Need for change

It will be interesting to see how much longer these traditional but inefficient arrangements survive, given the move to online resources and the ease with which overseas customers can order books directly from **Amazon**, **eBay**, and other U.S. retailers, as well as from the international distributors (which now include U.S. companies such as **Baker & Taylor**, **Ingrams**, and others). But that's by no means the only, or the most important, area for change. We are at a watershed, a time when reference has to prove its value to a world in which knowledge is valued, but when consumers often expect it to be free, online, and always up to date.

Online commerce at its best has superb customer service, with quick response, readiness to change based on new information, and direct interaction between producers and their customers. In the reference world, the opposite is true: there's a great reluctance to change (librarians are far more comfortable with technology than most senior editors and publishers), and there is little interaction between producers and customers.

There are some reference publishers who still resist the digital world. I think of them as horse-and-buggy publishers, and they'll grumble all the way to the end of the line. Then there are the Mr Toads, publishers who always have to have the latest and greatest model. (And, like *Mr Toad in The Wind in the Willows*, they're usually rich enough to buy another, and another, and another.) I don't think any of us knows what will be seen as the digital reference Model T — that's how early a stage we're at in the development of online reference. Developments in publishing will echo what's happened in other online businesses: a great deal of consolidation, sometimes successful and often not. As delivery technologies became more sophisticated and affordable, there will be challenges from a variety of small specialist providers who can quickly adapt, focus, and refine their products to meet the needs of a particular audience.

I deeply believe that reference publishers supply "a sound article that is really needed:" knowledge about our world, past, present, and future. The question we face today is how to work with scholars, librarians, and our readers to create an industry that is both profitable and sustainable, a vital strand in today's World Wide Web. 

Index Appreciation: A Publisher's Brief Guide

by **Sylvia K. Miller** (Formerly Publishing Director, Reference, Routledge, Taylor & Francis Group LLC) <sylviak.miller@gmail.com>

Surprisingly, the seemingly mundane book index can be the cause of great anxiety, late nights of work on nearly impossible deadlines, and dramatic confrontations. When the index brews trouble, the explosion occurs at the most inconvenient moment, at the end of the production process when the publication date is set in stone and press time is reserved.

For example, if an indexer boasts that she is so pleased with her work that she wants to enter her newly completed index manuscript in an indexing contest, while at the same time the author of the book complains in desperate tones that the indexer has completely misunderstood and misrepresented a lifetime of work, then you have to learn something besides editorial diplomacy. The clearest lessons often take shape from the worst problems. In this case, I learned how important it is that an indexer understand and appreciate the outlook and purpose of a book. If the indexer is incompatible with the book, and the problem is not caught early on, disaster awaits.

Over my years in scholarly publishing, such problems have illuminated important points about indexing that eventually formed a sort of pathway or strategy for commissioning and editing a useful and suitable index. However, I have never taken an indexing course, and I still approach indexers with a measure of awe. With this as a disclaimer, I would like to share with librarians some of the basic decisions that go into creating an index for a scholarly book in the hopes of dispelling a couple of common misconceptions and renewing appreciation for the indexing art.

Type of Index

Historians of the book find the index a fascinating window into the interests and approaches of the supposed reader at the time of publication. The editor first asks, Who will use the index, how often, and for what purpose? A novel almost never needs an index, but a biography does because some researchers may not read the whole book or may return to the book to locate specific events. A monograph needs a decent index for the same reasons, although its index will not have to take into consideration a nonprofessional reader who might not recognize certain terminology, whereas the index to a reference book usually will.

An index of basic terms, or proper names only, will often suffice. However, an analytical index will give the greatest number of potential readers a port of entry to the content of the book.

Separate or multiple indexes are some-

times considered, such as an index of case names in a book on legal history. Fearing that researchers looking for quick answers might not notice multiple indexes in the back of the book and might instead mistakenly assume that the legal case they are looking for is absent, I always argue for a combined index.

The Indexer

The indexer for most books is the author, who knows the content of the book best. The production editor usually provides a set of basic indexing instructions, and the author does his or her best, with varied results. Some authors are intrigued by the task and turn out to be talented at thinking of their ideas in this new structure. Others, however, might be wonderful writers but the first to admit that they cannot index, while still others will be affected by weariness with the book project's endless editors' queries and typographical errors generally, impatience to get beyond this stage and enjoy the well-deserved book party, or distraction by a flooded basement and a visit by five grandchildren.

The publisher hires a professional indexer when (a) the author refuses to attempt the task and prefers to see the cost of the index charged against future royalties and (b) the index is such an important feature of the project that none other than a professional indexer will do. We try to choose a professional indexer who has some knowledge and appreciation of the subject of the book. Indexers for scientific and medical books are a separate, highly prized, breed. The indexer must be capable of reading a passage of the book and summing it up in a brief, understandable term or phrase that may not actually appear on that page. (This capability is important to note because a basic electronic search engine cannot do it.)

The indexer must also understand the intended audience. "What will people look up?" must be the indexer's mantra throughout the indexing process. The simple terminology that students often research might occur infrequently in the book, whereas the information that they seek might be there in depth, disguised, as it were, in different, perhaps higher-level, language. The indexer and the editor might discuss connections that could be made for accessibility.

Necessary Tools

The indexer must use indexing software, to allow flexibility in making last-minute changes. For example, the publisher might decide that list style subentries must be changed to run-on style, to save space on the typeset pages, or preliminary page numbers called "false folios" might have to be automatically converted to final page numbers when the index is complete. The preferred spelling of a recurring term might be changed. Or a large portion of the book might

continued on page 36

